Sportswear, Casual Wear, Separates and Jeans (Women's, Misses' and Juniors')

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SPORTSWEAR, CASUALWEAR, SEPARATES & JEANS

Market Trends

After modest gains in 1981, the women's sportswear industry is suffering in the current recession which has affected almost every segment of the U.S. economy. Industry analysts report that over the first six months of 1982, unit consumption of women's sportswear has barely held even with that of last year. This has forced retailers to reevaluate their marketing strategies with most responding by shifting their emphasis towards the more affluent, up-scale customer whose purchasing power has not been severely eroded by the down swing in the economy.

Of all categories of sportswear, active wear has turned in the best performance in recent years. Benefiting from the fitness and health craze which has swept the country, active wear sales (both men's and women's) have doubled from an estimated $3 billion in 1977 to $6 billion in 1981. With nearly half of all adult Americans presently engaged in some sort of sport or fitness activity on a regular basis, the outlook for continued growth in the active wear field remains good for the foreseeable future.

It is now a commonly accepted fact that the jeans market is a mature one and the phenomenal growth that had been registered by the group in the past will not recur in the near term unless new, unforeseen circumstances are introduced into the market (such as designer jeans in the 1970's). It is now believed (WWD, September 9, 1982) that it will take until 1985 before U.S. consumption reattains its 1981 sales peak of 525 million units (men's & women's). Recent reports on jeans sales (WWD, September 14, 1982) indicate that the group is showing increased sales for the first time in nearly a year, during the fall 1982 season. Retailers report that renewed interest in the classic jean as well as new styles of jeans are fueling this upswing.

While many traditional sportswear firms are diversifying into other areas in order to maintain sales, others, particularly designer jean companies, are licensing their names to other companies in order to offset declines in sales of their own companies products. Although no reliable figures are available for licensed sales of women's sportswear alone, overall licensing, (both men's and women's apparel) account for $13.7 billion in sales presently and this figure is expected to grow to $75 billion by 1990.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census -- the most recent covering the year 1977. During the intercensual period, annual surveys are conducted by the Bureau among a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity, and these estimates have now been published for the years 1978, 1979, and 1980.

Between 1979 and 1980 the value added by manufacturers of women's, misses' and juniors' outerwear increased 19.1% while value added to materials of knit outerwear mills was up 22.2%. In the blouse segment of the women's sportswear industry, value added by the manufacturer was up only minimally (2.6%).

GENERAL STATISTICS ON THE INDUSTRY

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	1,291	--
Number of establishments, total**	na	1,502#	1,018#	1,415	--
Employees, total (thous.)	84.1	85.1	78.8	83.3	- 1.2%
Production workers (thous.)	72.6	73.9	70.7	73.8	- 1.8
Payroll (mil. $)	$716.6	$689.2	$587.7	$569.0	+ 4.0
Value added by manufacture, (mil. $)##	1,418.9	1,383.5	1,410.6	1,192.5	+ 2.6
Value of industry shipments, (mil. $)###	2,715.5	2,673.1	2,613.0	2,333.6	+ 1.6
Capital expenditures, new (mil. $)	34.3	32.8	27.3	24.0	+ 4.6

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	1,626	--
Number of establishments, total**	na	1,610#	1,435#	1,794	--
Employees, total (thous.)	117.9	109.4	106.4	104.1	+ 7.7%
Production workers (thous.)	102.6	94.6	92.3	87.9	+ 8.5
Payroll (mil. $)	$960.0	$827.4	$777.7	$732.7	+ 16.0
Value added by manufacture, (mil. $)##	2,000.4	1,679.7	1,855.0	1,574.0	+ 19.1
Value of industry shipments, (mil. $)###	3,994.3	3,399.6	3,573.1	3,285.1	+ 17.5
Capital expenditures, new (mil. $)	52.4	44.9	42.3	42.4	+ 16.7

Knit Outerwear Mills (SIC 2253*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	902	--
Number of establishments, total**	na	884#	782#	953	--
Employees, total (thous.)	67.1	61.9	72.1	73.0	+ 8.4%
Production workers (thous.)	57.9	53.4	62.8	62.7	+ 8.4
Payroll (mil. $)	$637.4	$548.1	$608.5	$582.0	+ 16.3
Value added by manufacture, (mil. $)##	1,339.1	1,096.0	1,202.8	1,159.5	+ 22.2
Value of industry shipments (mil. $)###	2,571.7	2,220.8	2,333.3	2,335.9	+ 15.8
Capital expenditures, new (mil. $)	48.5	35.6	44.2	49.9	+ 36.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

na = not available
n.e.c. = not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture or women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric, also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate figures not available as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. This SIC is covered in the Women's Coats and Suits Fact File.

**Each business location is counted as a separate establishment.

Covers establishments with paid employees only, as reported in County Business Patterns.

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b. plant, after discount and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales).
The total value of specific products shipped by both manufacturers classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered in the following section for the latest year available compared with the previous year, based on a sample survey.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Annual Survey of Manufactures, 1979, 1980,
County Business Patterns, 1978, 1979.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Current information on employment and earnings in the women's sportswear industry is published by the U.S. Bureau of Labor Statistics. According to this source, knit outerwear mills and women's, misses' and juniors' outerwear manufacturers registered small increases in employment in 1981 (3.2% and 1.9%, respectively) while the blouse segment held relatively even, with an increase of only 1,000 employees (0.2%). However average weekly earnings of production workers in all three segments of the industry rose during this same period.

Over the first four months of 1982, the industry has undergone a major contraction. Employment in every segment has declined by at least 4.3% while production worker hours have also declined with the largest declines in knit outerwear mills and women's, misses' and juniors' outerwear.

Employment & Earnings in Selected Women's Sportswear Manufacturing

	January - April Average			Annual Average		
	1982	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Women's, misses' & juniors' blouses (SIC 2331*):						
All employees (thous.)	59.2	62.7	- 5.6%	62.4	62.3	+ 0.2%
Production workers (thous.)	51.1	54.9	- 6.9	54.4	54.1	+ 0.6
Average weekly earnings	$158.40	$154.17	+ 2.7	$158.10	$146.97	+ 7.6
Average weekly hours	33.0	33.7	- 2.1	34.0	34.1	- 0.3
Average overtime hours	0.8	0.8	--	0.9	0.8	+ 12.5
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*):						
All employees (thous.)	141.6	148.5	- 4.6	147.1	144.4	+ 1.9
Production workers (thous.)	119.0	123.1	- 3.3	122.6	120.4	+ 1.8
Average weekly earnings	$163.68	$165.86	- 1.3	$166.47	$153.97	+ 8.1
Average weekly hours	33.2	35.1	- 5.4	34.9	34.6	+ 0.9
Average overtime hours	1.0	1.1	- 9.1	1.1	1.0	+ 10.0
Knit outerwear mills (SIC 2253*):						
All employees (thous.)	66.5	69.2	- 3.9	71.5	69.3	+ 3.2
Production workers (thous.)	55.9	58.7	- 4.8	60.7	59.4	+ 2.2
Average weekly earnings	$184.85	$184.86	--	$188.87	$179.63	+ 5.1
Average weekly hours	5.24	4.96	+ 5.6	37.4	38.3	- 2.3
Average overtime hours	35.3	37.3	- 5.4	2.1	2.5	- 16.0

n.e.c. = not elsewhere classified
* = for definition of SIC Codes, see page 3

Source: U.S. Bureau of Labor Statistics, Employment & Earnings, June 1982, July 1982, Revised Establishment Data, June 1982

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The vast majority of establishments in the women's sportswear and separates industries are concentrated in small firms with less than 100 employees. In 1977, in the women's, misses' and juniors' blouse industry only 15.6% of all establishments had more than 100 employees as compared with 16.6% in knit outerwear mills and 18.0% in the women's, misses' and juniors' outerwear segments.

Of reported segments of sportswear manufacturing industries, the biggest concentration is noted among knit outerwear mills. The eight largest companies accounted for 27% of total shipments by knit outerwear mills in 1977. Comparable figures for other segments of women's sportswear manufacturing were 15.2% for blouses, 17.8% for outerwear (as defined in the Standard Industrial Classification system).

The Women's Sportswear Industry by Employment Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of total	Number (Thous.)	% of total	Mil. $	% of total
Women's, misses' & juniors' blouses (SIC 2331*) total	1,502	100.0%	88.3	100.0%	$680.9	100.0%
By establishment size:						
Under 10 employees	331	22.0	(D)	--	(D)	--
10 to 19 employees	216	14.4	3.6	4.1	34.1	5.0
20 to 49 employees	398	26.5	14.5	16.4	113.6	16.7
50 to 99 employees	322	21.4	24.1	27.3	172.5	25.3
100 or more employees	235	15.6	(D)	--	(D)	--
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*) total	1,610	100.0%	106.4	100.0%	$837.0	100.0%
By establishment size:						
Under 10 employees	361	22.4	(D)	--	(D)	--
10 to 19 employees	213	13.2	3.7	3.5	32.4	3.9
20 to 49 employees	454	28.2	16.5	15.5	124.4	14.9
50 to 99 employees	292	18.1	21.6	20.3	162.4	19.4
100 or more employees	290	18.0	(D)	--	(D)	--
Knit outerwear mills (SIC 2253*) total	884	100.0%	66.1	100.0%	$609.1	100.0%
By establishment size:						
Under 10 employees	258	29.2	1.1	1.7	20.6	3.4
10 to 19 employees	167	18.9	2.6	3.9	31.0	5.2
20 to 49 employees	209	23.6	7.3	11.0	65.0	10.7
50 to 99 employees	103	11.7	7.4	11.2	62.0	10.2
100 or more employees	147	16.6	47.7	72.2	430.5	70.7

D = Withheld to avoid disclosure.
n.e.c. = not elsewhere classified
* = For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census,
County Business Patterns, 1979

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Concentration in the Industry by Company Size, 1977

	Companies	Establishments	Employees	(Mil. $) Shipments
Women's, misses' & juniors' blouses, total	1,292	1,415	83,300	$1,192.5
Percent accounted for by:				
4 largest companies	0.3%	0.9%	3.7%	10.2%
8 largest companies	0.6	1.6	6.3	15.2
20 largest companies	1.5	4.2	13.8	23.9
50 largest companies	3.8	8.2	22.9	39.2
All other companies	96.2	91.8	77.1	60.8
Women's, misses' & juniors' outerwear, total	1,625	1,794	104,100	$1,574.0
Percent accounted for by:				
4 largest companies	0.2%	2.2%	10.3%	11.7%
8 largest companies	0.4	3.5	14.9	17.8
20 largest companies	1.1	4.8	20.7	34.3
50 largest companies	2.9	8.1	30.7	49.2
All other companies	97.1	91.9	69.3	50.8
Knit outerwear mills, total	903	953	73,000	$2,335.9
Percent accounted for by:				
4 largest companies	0.4%	0.9%	10.7%	17.0%
8 largest companies	0.8	1.6	16.6	27.0
20 largest companies	2.1	3.8	35.7	45.6
50 largest companies	5.4	8.8	50.4	62.6
All other companies	94.6	91.2	49.6	37.4

Source: U.S. Bureau of the Census, Concentration Ratios in Manufacturing, Census of Manufactures, 1977, MC77-SR-9.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Women's, Misses' & Juniors' Sportswear Industry, 1980, Median Results

	Women's, Misses' & Juniors' Blouses	Women's, Misses' & Juniors' Outerwear	Knit Outerwear Mills
Number of manufacturers reporting	285	386	180
Current assets to current debt (times)	1.75	2.85	1.82
Net profits to net sales (percent)	2.37	2.79	1.82
Net profits to net worth (percent)	21.04	23.04	13.55
Net sales to net worth (times)	8.13	7.49	6.31
Net sales to net working capital (times)	9.14	7.89	7.32
Average collection period (days)	34	39	30
Net sales to inventory (times)	11.3	8.5	10.8

Source: Dun & Bradstreet, Inc., Business Economics Division, 1980 Key Business Ratios, (All Rights Reserved)

By Region

New York was the major producing state for all three categories of women's sportswear in 1977, according to the U.S. Bureau of the Census. This one state accounted for over 50% of all plants producing knit outerwear in that year while also representing 33.0% of those making women's, misses' and juniors' outerwear and 24.9% of all blouse producing establishments. California had the second largest number of blouse and outerwear plants while New Jersey was second in the knit outerwear mill category.

New York also ranked first in employment in the women's, misses' and juniors' outerwear and knit outerwear categories while Pennsylvania was ranked first in employment of women's, misses' and juniors' blouse workers.

Women's, Misses' & Juniors' Sportswear Industries By Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total
Women's, misses' & juniors' blouse industry (SIC 2331*)				
U.S. Total	1,415	952	83.3	100.0%
Leading States:				
New York	353	197	12.4	14.9
California	293	151	10.9	13.1
Pennsylvania	277	249	20.0	24.0

(continued)

By Region

Women's, Misses' & Juniors' Sportswear Industries
By Leading States, 1977
(continued)

	Number of Establishments		Employees	
Women's, misses' & juniors' blouse industry (SIC 2331*) (cont'd.)	Total	20 or more Employees	Thousands	% of total
Leading States:				
New Jersey	79	50	3.0	3.6%
Florida	66	34	2.8	3.4
Texas	41	21	2.3	2.8
North Carolina	40	31	5.0	6.0
South Carolina	37	33	4.3	5.2
Georgia	34	28	3.5	4.2
Virginia	27	26	4.1	4.9
All other states	168	132	15.0	18.0
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*)				
U.S. Total	1,794	1,064	104.1	100.0%
Leading States:				
New York	592	313	21.2	20.4
California	314	156	14.1	13.5
Pennsylvania	128	91	8.9	8.5
Florida	100	45	3.3	3.2
New Jersey	97	57	4.0	3.8
Massachusetts	59	40	2.9	2.8
North Carolina	56	39	5.8	5.6
Texas	55	46	7.2	6.9
Georgia	51	40	4.0	3.8
Tennessee	34	27	5.0	4.8
All other states	308	210	27.7	26.6
Knit outerwear mills, (SIC 2253*)				
U.S. Total	953	551	73.0	100.0%
Leading States:				
New York	477	254	17.5	24.0
New Jersey	98	51	4.2	5.8
Pennsylvania	84	67	12.6	17.2
California	73	33	2.5	3.4
North Carolina	45	30	8.2	11.2
Florida	24	13	2.5	3.4
Massachusetts	21	16	2.6	3.6
Ohio	11	7	(D)	--
Virginia	10	10	7.1	9.7
South Carolina	10	7	(D)	--
All other states	100	63	na	na

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

(footnotes for previous table)

* = See page 3 for definitions of these classifications.
n.e.c. = not elsewhere classified
na = not available
(D) = Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

PRODUCTION

According to preliminary figures on the production of women's apparel in 1982, issued by the National Cotton Council of America, only the sweater and pants categories registered declines in unit production between 1980 and 1981.

The latest government data on cuttings of women's sportswear are from the Census Bureau's Current Industrial Reports series, based on a sample survey, covering the year 1980. In that year the largest increase in production was recorded by separate tailored suit-type jackets whose cuttings were up 16.8% over the previous year. A close second was the sweatshirt group which increased 13.4% over 1979 production of 7,344,000 units.

The biggest loser of production between 1979 and 1980 was the vests, except sweater vests category whose cuttings fell by over a third to 1,377,000 units.

U.S. Production of Women's, Misses' & Juniors' Sportswear 1979 - 1981(p)
(In Thousands of Units)

	1981(p)	1980	1979	% Change 1981/1980	% Change 1980/1979
Reported sportswear items:					
Tops:					
Blouses & shirts, exc. knit sports shirts	474,900	320,448	330,096	+ 6.4%	- 2.9%
Knit sports shirts		126,036	128,496		- 1.9
Sweaters	51,108	53,040	58,800	- 3.6	- 9.8
Pullovers	40,140	41,376	45,828	- 3.0	- 9.7
Coat & cardigan	10,968	11,664	12,972	- 6.0	- 10.1
Jackets	23,436	22,383	19,378	+ 4.7	+ 15.5
Separates tailored suit-type	21,132	20,131	17,238	+ 5.0	+ 16.8
Nontailored outer jacket	2,304	2,252	2,140	+ 2.3	+ 5.2
Vests, exc. sweater vests	1,344	1,377	2,159	+ 2.4	- 36.2
Bottoms:					
Skirts	78,576	70,152	67,003	+ 12.0	+ 4.7
Pants, total	216,120	231,207	222,847	- 6.5	+ 3.8
Slacks, exc. jeans & dungarees	152,760	160,801	156,358	- 5.0	+ 2.8
Jeans & dungarees	63,360	70,406	66,489	- 10.0	+ 5.9

(continued)

U.S. Production of Women's, Misses' & Juniors' Sportswear 1979 - 1981(p)
(In Thousands of Units)
(continued)

	1981(p)	1980	1979	% Change 1981/1980	% Change 1980/1979
Active Sportswear:					
Athletic shorts, inc. jogging shorts, tennis shorts, tennis skirts, etc.	2,508	2,388	2,412	+ 5.0%	- 1.0%
Sweatshirts	9,156	8,328	7,344	+ 9.9	+ 13.4
Warm-up or jogging suits	5,628	5,364	5,976	+ 4.9	- 10.2
Swimwear	26,724	25,452	26,808	+ 5.0	- 5.1
Skiwear, inc. jackets & pants whether sold separately or as a unit	na	2,172	2,184	--	- 0.5
Playgarments:					
Shorts, exc. jogging & tennis	29,592	28,188	25,632	+ 5.0	+ 10.0
Playsuits, beach tops, halters & other playgarments	5,028	4,788	5,460	+ 5.0	- 12.3

(p) = preliminary

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear (MA-23F(80)-1).

National Cotton Council of America,
Cotton Counts Its Customers (1982 Edition).

By Fabric/Construction

The distribution of 1979 and 1980 cuttings of women's sportswear and separates by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)

	1980	1979	% Change 1980/1979
Blouses & shirts, exc. knit outerwear sport shirts, total	320,448	330,096	- 2.9%
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	35,532	32,112	+ 10.7
All man-made & chiefly man-made	136,620	132,096	+ 3.4
All wool & chiefly wool	9,312	2,568	na
All other fabric		6,780	na

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)
(continued)

Blouses & shirts, exc. knit outerwear sport shirts (cont'd.)	1980	1979	% Change 1980/1979
By fabric:			
Knit fabric			
All cotton & chiefly cotton	14,148	13,200	+ 7.2%
All man-made & chiefly man-made	87,420	107,184	- 18.4
All wool & chiefly wool	3,576	1,860	na
All other fabric		2,124	na
Fabric, n.s.k.	33,840	32,172	+ 5.2
Knit outerwear sport shirts, exc. sweater shirts, total	126,036	128,496	- 1.9
By fabric:			
All cotton & chiefly cotton	29,088	38,292	- 24.0
All man-made and chiefly man-made	88,248	83,772	+ 5.3
All wool & chiefly wool	1,008	984	+ 2.4
All other fabrics			
Fabrics, n.s.k.	7,692	5,448	+ 41.2
Pullover sweaters, total	41,376	45,828	- 9.7
By fabric:			
All cotton & chiefly cotton	2,688	2,916	- 7.8
All man-made & chiefly man-made	29,196	34,128	- 14.5
All wool & chiefly wool	3,492	4,188	- 16.6
Fabric, n.s.k.	6,000	4,596	+ 30.5
Coat & cardigan sweaters, total	11,664	12,972	- 10.1
By fabric:			
All cotton & chiefly cotton	11,292	12,696	- 11.1
All man-made & chiefly man-made			
All wool & chiefly wool	372	276	+ 34.7
Separate tailored suit-type jackets, total	20,131	17,238	+ 16.8
By construction:			
Woven fabric	11,828	8,413	+ 40.6
Knit fabric	6,916	7,843	- 11.8
Construction, n.s.k.	1,387	982	+ 41.2
By fabric:			
All cotton & chiefly cotton	1,321	1,292	+ 2.2
All man-made & chiefly man-made	13,323	11,913	+ 11.8
All wool & chiefly wool	3,859	2,966	+ 30.1
All other fabrics	260	94	+176.6
Fabrics, n.s.k.	1,368	973	+ 40.6

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)
(continued)

	1980	1979	% Change 1980/1979
Nontailored outer jackets, exc. ski, total	2,252	2,140	+ 5.2%
By construction:			
Woven fabric	1,739	1,585	+ 9.7
Knit fabric	351	302	+ 16.2
Construction, n.s.k.	162	253	- 36.0
By fabric:			
All cotton & chiefly cotton	307	388	- 20.9
All man-made & chiefly man-made	1,581	1,293	+ 22.3
All wool & chiefly wool / All other fabrics	201	242	- 16.9
Fabrics, n.s.k.	163	217	- 24.9
Vests, exc. sweater vests, total	1,377	2,159	- 36.2
By construction:			
Woven fabric	738	940	- 21.5
Knit fabric	488	1,152	- 57.6
Construction, n.s.k.	151	67	+125.4
By fabric:			
All cotton & chiefly cotton	130	301	- 56.8
All man-made & chiefly man-made	1,025	1,759	- 41.7
All wool & chiefly wool	50	52	- 3.8
All other fabrics	13	9	+ 44.4
Fabrics, n.s.k.	159	38	+318.4
Shirts, total	70,152	67,003	+ 4.7
By construction:			
Woven fabric	40,736	38,649	+ 5.4
Knit fabric	23,797	22,762	+ 4.5
Construction, n.s.k.	5,619	5,592	+ 0.5
By fabric:			
All cotton & chiefly cotton	7,609	7,799	- 2.4
All man-made & chiefly man-made	47,404	45,807	+ 3.5
All wool & chiefly wool	8,034	6,855	+ 17.2
All other fabric	756	720	+ 5.0
Fabric, n.s.k.	6,349	5,822	+ 9.1
Slacks, except dungarees & jeans, total	160,801	156,358	+ 2.8
By construction:			
Woven fabric	81,946	78,590	+ 4.3
Knit fabric	59,255	58,863	+ 0.7
Construction, n.s.k.	19,600	18,905	+ 3.7

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)
(continued)

Slacks, except dungarees & jeans (cont'd.)	1980	1979	% Change 1980/1979
By fabric:			
All cotton & chiefly cotton	14,892	14,179	+ 5.0%
All man-made & chiefly man-made	112,072	108,103	+ 3.7
All wool & chiefly wool	6,592	6,436	+ 2.4
All other fabrics	4,989	2,689	+ 85.5
Fabrics, n.s.k.	22,256	24,951	- 10.8
Jeans & dungarees, total	70,406	66,489	+ 5.9
By fabric:			
All cotton & chiefly cotton	58,466	57,568	+ 1.6
All man-made & chiefly man-made	7,163	5,899	+ 21.4
Fabric, n.s.k.	4,777	3,022	+ 58.1
Swimwear, total	25,452	26,808	- 5.1
By construction:			
Woven fabric	3,708	4,464	- 16.9
Knit fabric / Construction, n.s.k.	21,744	22,344	- 2.7
Shorts, exc. jogging & tennis, total	28,188	25,632	+ 10.0
By construction:			
Woven fabric	10,188	10,308	- 1.2
Knit fabric	16,236	14,424	+ 12.6
Construction, n.s.k.	1,764	900	+ 96.0
By fabric:			
All cotton & chiefly cotton	10,548	10,452	+ 0.9
All man-made & chiefly man-made / All other fabrics	17,640	15,180	+ 16.2
Playsuits, beach tops, halters & other playwear, total	4,788	5,460	- 12.3
By construction:			
Woven fabric	1,476	1,404	+ 5.1
Knit fabric	2,400	2,748	- 12.7
Construction, n.s.k.	912	1,308	- 30.3
By fabric:			
All cotton & chiefly cotton	1,368	1,416	- 3.4
All man-made & chiefly man-made	1,704	2,124	- 19.8
All other fabrics	804	660	+ 21.8
Fabrics, n.s.k.	912	1,260	- 27.6

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(80)-1.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified women's, misses' & juniors' sportswear categories, as noted below.

Materials Consumed in the Production of Women's, Misses' & Juniors' Sportswear 1977, 1972

	Delivered Cost (Mil. $)		% Change
	1977	1972	1977/1972
Women's, misses' & juniors' blouses (SIC 2331*)			
Materials, containers & supplies	$743.0	$404.9	+ 83.5%
Broadwoven fabrics	256.1	111.7	+129.3
Purchased knitted fabrics	217.4	176.7	+ 23.0
All other materials, components & supplies, inc. n.s.k.	269.5	116.5	+131.3
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*)			
Materials, containers & supplies	1,187.9	568.9	+108.9
Broadwoven fabrics	495.2	201.4	+145.9
Purchased knitted fabrics	251.3	238.4	+ 5.4
All other materials, components & supplies, including those not specified by kind	441.4	128.8	+242.7
Knit outerwear mills, (SIC 2253*)			
Materials, containers & supplies	887.9	650.7	+ 36.5
Purchased knitted fabrics	90.4	16.4	+451.2
Carded cotton yarns	36.1	32.6	+ 10.7
Combed cotton yarns	29.7	43.8	- 32.1
Rayon & acetate spun yarns	1.7	6.2	- 72.6
Nylon spun yarns	8.7	19.2	- 54.7
Polyester spun yarns	34.0	74.5	- 54.4
Acrylic yarns	128.0	92.6	+ 38.2
Wool yarns	24.3	56.3	- 56.8
Rayon & acetate spun yarns	1.4	1.4	--
Nylon filament yarns	18.1	30.8	- 41.2
Polyester filament yarns	35.2	61.1	- 42.4
All other yarns	24.2	17.2	+ 40.7
All other materials, components & supplies including those not specified by kind	456.1	198.6	+129.7

n.s.k. = not specified by kind
* = for SIC definition see page 3.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC77-1-22B, MC77-1-23B.

PRODUCTION

By Price Line

Production of Blouses & Shirts by Wholesale Price, 1979, 1980
(Thousands of Units)

	1980	1979	% Change 1980/1979	% Distribution 1980
Blouses & shirts, exc. knit outerwear sport shirts, total	320,448	330,096	- 2.9%	100.0%
By price per dozen:				
Under $23.00	15,612	22,236	- 29.8	4.9
$23.00 - $38.99	28,536	17,364	+ 64.3	8.9
$39.00 - $59.99	72,900	75,816	- 3.8	22.7
$60.00 & over	169,116	168,924	+ 0.1	52.8
Price line, not reported	34,284	45,756	- 25.1	10.7

Source: U.S. Bureau of the Census
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(80)-1.

Seasonality of Production

The following table shows the 1981 distribution of production by months in specified types of women's sportswear and separates, as reported in the Census Bureau's monthly survey.

Monthly Cuttings of Selected Women's Sportswear, 1981
(% of Years Total)

	Skirts	Slacks*	Blouses	Sweaters**
Total	100.0%	100.0%	100.0%	100.0%
January	8.3	8.9	8.1	6.7
February	9.6	8.4	8.8	6.9
March	10.1	9.6	9.1	6.8
April	9.1	9.2	8.3	6.1
May	8.8	8.4	8.1	8.6
June	9.9	8.2	8.0	9.7
July	7.6	7.9	8.1	10.3
August	8.2	8.4	8.6	10.1
September	7.7	8.1	10.1	10.0
October	7.8	8.4	8.7	10.6
November	7.2	7.8	7.2	8.8
December	5.8	6.7	6.9	5.4

* = Includes jeans & dungarees
** = Based on shipments

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's, Misses' & Juniors' Apparel,
M23H(81)-12.

SHIPMENTS

Total U.S. shipments of women's, misses' and juniors' sportswear and separates increased 8.1% in value in 1980 compared to 1979, according to the Census Bureau's Current Industrial Reports survey. Shipments of shorts (excluding tennis and jogging) showed the sharpest gain in dollar value of shipments between 1979 and 1980, rising 32.2% during the period to over $75 million. Cardigan and coat-type sweaters' registered the biggest decline of the group, falling to $85.7 million in shipment value from $96.1 million in the preceding year. The only other categories registering declines during the period were pullover sweaters (-7.9%), vests (-8.1%) and playsuits (-0.4%).

Blouses and shirts accounted for the largest share of women's sportswear and separates shipment dollars, garnering nearly one out of every three dollars in the group. Slacks (except jeans and dungarees) was the second largest category, representing 29.3% of total shipments in 1980.

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear Categories, 1979, 1980

	Millions of Dollars		% Change
	1980	1979	1980/1979
All reported categories	$6,533.5	$6,043.7	+ 8.1%
Tops:			
Blouses & shirts, except knit outerwear sport shirts	1,980.1	1,924.3	+ 2.9
Knit outerwear sport shirts	592.3	550.0	+ 7.7
Sweaters	346.3	379.0	- 8.6
Pullovers	260.6	282.9	- 7.9
Cardigan & coat-type	85.7	96.1	- 10.8
Jackets	496.8	396.9	+ 25.2
Separate tailored suit-type	438.2	348.9	+ 25.6
Nontailored outer jackets, exc. ski jackets	58.6	48.0	+ 22.1
Vests, exc. sweater vests	15.9	17.3	- 8.1
Bottoms:			
Skirts	730.0	642.1	+ 13.7
Pants, total	1,912.3	1,712.2	+ 11.7
Slacks, exc. jeans & dungarees	1,321.9	1,214.9	+ 8.8
Jeans & dungarees	590.4	497.3	+ 18.7
Active Sportswear:			
Athletic shorts, exc. jogging shorts tennis shorts, tennis skirts, etc.	21.0	17.8	+ 18.0
Sweatshirts	30.4	25.9	+ 17.4
Swimsuits	244.5	242.7	+ 0.7
Skiwear, inc. jackets & pants, whether sold separately or as a unit	62.2	52.2	+ 19.2
Playgarments:			
Shorts, exc. tennis & jogging	75.9	57.4	+ 32 2
Playsuits, beach tops, halters, & other playwear	25.8	25.9	- 0.4

Source: U.S. Bureau of the Census, Current Industrial Reports, Women's & Children's Outerwear MA-23F(80)-1.

SHIPMENTS

By Leading States

New York was the leading state for shipments in nine of the eleven women's sportswear and separates categories measured by the Census Bureau in the 1977 Census of Manufactures. California was the leading state for shipments of bathing suits, Pennsylvania led in shirts and blouses, and North Carolina accounted for the largest share of knit outerwear sport shirts in 1977.

Value of Shipments by All Producers of Specified Women's Sportswear By Leading States, 1977

	Value of Shipments	
	Mil. $	% of total
Women's, misses' & juniors' knit outerwear sport shirts, U.S. total	$ 499.1	100.0%
Leading States:		
New York	139.1	27.9
California	130.8	26.2
Pennsylvania	60.1	12.0
North Carolina	34.6	6.9
New Jersey	31.4	6.3
Women's, misses' & juniors' blouses & shirts, U.S. total	1,421.7	100.0
Leading States:		
New York	556.5	39.1
California	254.6	17.9
Pennyslvania	151.8	10.7
Texas	81.5	5.7
New Jersey	62.7	4.4
Contract work on women's, misses' & juniors' blouses & shirts, U.S. total	487.7	100.0
Leading States:		
Pennsylvania	124.7	25.6
New York	61.7	12.7
California	50.2	10.3
Virginia	34.3	7.0
South Carolina	30.7	6.3
Women's, misses' & juniors' washable service apparel, U.S. total	193.2	100.0
Leading States:		
New York	53.3	27.6
California	22.8	11.8
Georgia	22.1	11.4
Missouri	20.0	10.4
Tennessee	12.5	6.5

(continued)

SHIPMENTS

By Leading States

Value of Shipments by All Producers of Specified Women's Sportswear
By Leading States, 1977
(continued)

	Value of Shipments	
	Mil. $	% of Total
Women's, misses' & juniors' bathing suits, U.S. total	$ 163.8	100.0%
Leading States:		
California	72.3	44.1
New York	56.2	34.3
Pennsylvania	9.8	6.0
New Jersey	8.3	5.1
Women's, misses' & juniors' slacks, U.S. total	1,460.1	100.0
Leading States:		
New York	444.8	30.5
California	237.8	16.3
North Carolina	100.7	6.9
Massachusetts	100.0	6.8
Georgia	79.4	5.4
Women's, misses' & juniors' outerwear n.e.c., U.S. total	458.1	100.0
Leading States:		
New York	145.9	31.8
California	68.5	15.0
Ohio	34.4	7.5
North Carolina	29.3	6.4
New Jersey	22.3	4.9
Pennsylvania	22.3	4.9
Contract work on women's, misses' & juniors' outerwear, U.S. total	501.1	100.0
Leading States:		
New York	87.8	17.5
California	73.9	14.7
Pennsylvania	55.9	11.2
Virginia	31.0	6.2
Texas	30.9	6.2

(continued)

SHIPMENTS

By Leading States

Value of Shipments by All Producers of Specified Women's Sportswear By Leading States, 1977 (continued)

	Value of Shipments	
	Mil. $	% of Total
Sweaters, knit jackets & jerseys,		
U.S. total	$555.5	100.0%
Leading States:		
New York	220.6	39.7
Pennsylvania	110.4	19.9
New Jersey	34.5	6.2
North Carolina	32.3	5.8
California	9.1	1.6
Knit outerwear sport shirts,		
U.S. total	518.1	100.0
Leading States:		
North Carolina	95.5	18.4
Pennsylvania	93.1	18.0
New York	49.1	9.5
Other knit outerwear products,		
U.S. total	689.7	100.0
Leading States:		
New York	132.2	19.2
North Carolina	81.6	11.8
Wisconsin	39.7	5.8
California	19.8	2.9
New Jersey	11.0	1.6

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC77-1-23B, MC77-1-22B.

PRODUCER PRICE INDEXES

The largest jump in Producer (Factory) Price Indexes covering women's sportswear and separates between 1980 and 1981 was for sweaters, up 12.7% in the one year period. Prices for knit sportshirts rose 7.6% between 1980 and 1981 while the smallest increase of any category was in cut and sewn blouses where factory prices went up 3.4%. No measured category of women's sportswear and separates decreased between 1981 and the previous year in factory price levels.

As of June 1982, factory prices for all measured women's apparel averaged close to 4% above the 1981 annual average. Shirt prices were up 3.4%; blouses and shirts, 2.8%; sweaters, 6.2%.

PRODUCER PRICE INDEXES

Producer (Factory) Price Indexes for Selected Types of Women's Separates & Sportswear, 1978-1981
(1967 = 100, unless specified)

	June 1982	1981	1980	1979	1978	% Change 1981/1980	% Change 1980/1979
All apparel	193.0	186.0	172.4	160.4	152.4	+ 7.9%	+ 7.5%
Women's apparel, total	170.7	164.4	150.4	140.3	134.0	+ 9.3	+ 7.2
Skirts*	117.1	113.2	109.5	104.3	103.3	+ 3.4	+ 5.0
Cut-and-sewn blouses & shirts*	127.5	124.0	115.2	105.8	103.3	+ 7.6	+ 8.9
Knit sport shirts & tops*	na	na	115.0	97.1	100.7	na	+ 18.4
Sweaters	163.4	153.8	136.5	132.1	128.8	+ 12.7	+ 3.3

* 12/77 = 100
na = not available

Source: U.S. Department of Labor, Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Bureau of Industrial Economics, imports represented 22.1% of the value of U.S. consumption of women's and misses' blouses and shirts in 1981.

The import/new supply ratio--the latter defined as the sum of product shipments plus imports--was reported by the Bureau as follows for 1981 compared with 1978: women's blouses and shirts, 0.113 versus 0.097; women's outerwear, 0.124 versus 0.085. (In other words, imports of outerwear represented 12.4% of new supply in 1981 compared with 8.5% in 1978.)

The U.S. reported $2.7 billion worth of all types of women's and children's sportswear and separates in 1981 as opposed to $2.2 billion in the previous year for a gain of 20.8%. Both these figures are C.I.F. values (see footnotes on the following table), as recorded by the Census Bureau. On a quantity measurement, imports of sportswear and separates were almost 54 million dozen. This represents an increase of 12.1% over the 48,181 thousand dozen imported the year before.

Imports of skirts of all types showed the largest percentage increase between 1980 and 1981 rising 46.0% in unit terms and 41.3% in dollar terms. The only category registering a decline in imports in 1981 was sweaters, falling 3.1% in units, although they did manage to show an increase in dollar value during the year (up 5.0%).

FOREIGN TRADE

Imports

Summary of U.S. Imports of Women's & Children's Sportswear, 1980, 1981

	Quantity (Thous. Doz.) 1981	1980	% Change 1981/1980	Value C.I.F.* (Thous. $) 1981	1980	% Change 1981/1980
Total, all reported categories	53,999.5	48,181.3	+ 12.1%	$2,677,506	$2,217,339	+ 20.8%
Blouses & shirts, total	28,004.3	25,487.6	+ 9.9	1,122,460	922,292	+ 21.7
Blouses	13,125.8	11,283.8	+ 16.3	722,081	534,085	+ 35.2
Not knit	12,463.0	10,741.2	+ 16.0	667,934	498,219	+ 34.1
Cotton	6,858.1	6,003.5	+ 14.2	294,275	236,652	+ 24.3
Wool or man-made	5,158.2	4,430.4	+ 16.4	289,066	207,247	+ 39.5
Silk	446.7	307.3	+ 45.4	84,593	54,320	+ 55.7
Knit, wool	662.8	542.8	+ 22.1	54,147	35,866	+ 51.0
Shirts, knit						
Cotton or man-made	14,878.5	14,203.8	+ 4.8	400,379	388,207	+ 3.1
Sweaters, knit	9,938.4	10,273.7	- 3.3	649,447	618,409	+ 5.0
Cashmere, wholly or part	47.1	41.2	+ 14.3	19,234	13,653	+ 40.9
Sheep-like hair	387.4	347.9	+ 11.4	46,206	33,225	+ 39.1
Wool	1,236.4	1,667.3	- 25.8	122,161	143,886	- 15.1
Man-made	7,920.2	7,833.2	+ 1.1	429,992	397,225	+ 8.2
Cotton	347.3	384.1	- 9.6	31,854	30,420	+ 4.7
Pants, slacks & shorts	12,881.3	10,281.9	+ 25.3	743,576	565,071	+ 31.6
Not knit						
Cotton	8,703.7	7,715.3	+ 12.8	546,252	449,281	+ 21.6
Wool	106.0	74.6	+ 42.1	20,879	14,908	+ 40.1
Man-made	3,982.5	2,437.5	+ 63.3	161,709	91,992	+ 75.8
Silk	89.1	54.5	+ 63.5	14,736	8,890	+ 65.8
Skirts	1,810.7	1,240.4	+ 46.0	122,723	86,826	+ 41.3
Not knit	1,564.9	1,024.1	+ 52.8	103,717	68,719	+ 50.9
Wool	84.0	71.7	+ 17.2	18,788	16,183	+ 16.1
Man-made	314.2	151.8	+107.0	22,088	10,514	+110.1
Cotton	1,166.7	800.6	+ 45.7	62,841	42,022	+ 49.5
Knit	245.8	216.3	+ 13.6	19,006	18,107	+ 5.0
Wool	23.2	36.2	- 35.9	3,759	5,872	- 36.0
Cotton or man-made	222.6	180.1	+ 23.6	15,247	12,235	+ 24.6
Playsuits						
Not knit						
Cotton	1,364.8	897.7	+ 52.0	39,300	24,741	+ 58.8

* = The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135, December 1980, 1981.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981

	Quantity (Thous. Doz.) 1981	1980	% Change 1981/1980	Value C.I.F.* (Thous. $) 1981	1980	% Change 1981/1980
Blouses, cotton, not knit total	6,858.1	6,003.5	+ 14.2%	$294,275	$236,652	+ 24.3%
Hong Kong	2,756.2	1,873.5	+ 47.1	126,447	83,264	+ 51.9
India	2,357.3	2,234.0	+ 5.5	96,483	85,674	+ 12.6
Taiwan	374.5	410.0	- 8.7	17,135	15,957	+ 7.4
Blouses, wool or man-made not knit, total	5,158.2	4,430.4	+ 16.4	289,066	207,247	+ 39.5
Korea	1,176.5	988.6	+ 19.0	52,354	36,556	+ 43.2
Taiwan	701.3	745.3	- 5.9	51,104	38,870	+ 31.5
Hong Kong	686.1	744.9	- 7.9	59,958	52,957	+ 13.2
Blouses, silk, not knit total	446.7	307.3	+ 45.4	84,593	54,320	+ 55.7
Hong Kong	316.4	210.8	+ 50.1	53,365	31,404	+ 69.9
Korea	71.5	47.2	+ 51.5	15,116	8,623	+ 75.3
Mainland China	21.6	6.6	+227.3	2,725	858	+217.6
Blouses, wool, knit, total	662.8	542.8	+ 22.1	54,147	35,866	+ 51.0
Hong Kong	630.7	523.1	+ 20.6	51,049	34,145	+ 49.5
Korea	13.5	9.4	+ 43.6	1,062	528	+101.1
Mainland China	9.0	3.2	+181.3	539	174	+209.8
Shirts, cotton or man-made knit, total	14,878.5	14,203.8	+ 4.8	400,379	388,207	+ 3.1
Taiwan	3,419.3	4,053.3	- 15.6	107,289	123,167	- 12.9
Hong Kong	2,976.7	2,619.0	+ 13.7	85,741	80,645	+ 6.3
Korea	2,543.8	1,652.3	+ 54.0	65,617	41,919	+ 56.5
Sweaters, cashmere, knit, total	47.1	41.2	+ 14.3	19,234	13,653	+ 40.9
Hong Kong	30.5	23.7	+ 28.7	10,452	6,552	+ 59.5
United Kingdom	6.5	7.3	- 11.0	4,592	3,953	+ 16.2
Italy	5.2	3.7	+ 40.5	2,340	1,295	+ 80.7
Sweaters, sheep-like hair, knit, total	387.4	347.9	+ 11.4	46,206	33,225	+ 39.1
Hong Kong	290.9	218.6	+ 33.1	34,454	20,440	+ 68.6
Mainland China	22.7	66.1	- 65.7	2,161	5,513	- 60.8
Macao	17.9	14.5	+ 23.4	2,066	1,552	+ 33.1

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981
(continued)

	Quantity (Thous. Doz.) 1981	1980	% Change 1981/1980	Value C.I.F.* (Thous. $) 1981	1980	% Change 1981/1980
Sweaters, wool, knit, total	1,236.4	1,667.3	- 25.8%	$122,161	$143,886	- 15.1%
Hong Kong	615.6	840.1	- 26.7	63,885	73,115	- 12.6
Mainland China	210.6	399.4	- 47.3	13,063	28,115	- 53.5
Maurit	86.0	22.9	+275.5	5,006	1,320	+279.2
Sweaters, man-made, knit, total	7,920.2	7,833.2	+ 1.1	429,992	397,225	+ 8.2
Taiwan	3,278.7	3,800.8	- 13.7	202,087	203,995	- 0.9
Korea	2,657.5	2,462.4	+ 7.9	137,801	116,331	+ 18.5
Hong Kong	1,012.0	779.8	+ 29.8	56,475	52,333	+ 7.9
Sweaters, cotton, knit, total	347.3	384.1	- 9.6	31,854	30,420	+ 4.7
Hong Kong	199.5	252.2	- 20.9	19,155	19,891	- 3.7
Korea	34.1	30.6	+ 11.4	2,510	2,020	+ 24.2
Taiwan	32.9	23.3	+ 41.2	2,556	1,604	+ 59.4
Pants, slacks & shorts, cotton, not knit, total	8,703.7	7,715.3	+ 12.8	546,252	449,281	+ 21.6
Hong Kong	3,371.1	3,815.0	- 11.6	255,975	261,803	- 2.2
Japan	1,194.6	624.6	+ 91.3	62,081	29,642	+109.4
Mainland China	1,020.0	899.0	+ 13.5	43,312	26,341	+ 64.4
Pants, slacks & shorts, wool, not knit, total	106.0	74.6	+ 42.1	20,879	14,908	+ 40.1
Hong Kong	25.6	24.6	+ 4.1	4,608	4,102	+ 12.3
Japan	21.8	15.6	+ 39.7	2,851	1,800	+ 58.4
Taiwan	7.0	6.4	+ 9.4	751	764	- 1.7
Pants, slacks & shorts, man-made, not knit, total	3,982.5	2,437.5	+ 63.3	161,709	91,992	+ 75.8
Taiwan	2,162.4	1,368.7	+ 58.0	91,603	48,142	+ 90.3
Mainland China	464.8	36.9	+1,159.6	11,391	688	+1,555.7
Mexico	448.9	451.5	- 0.6	21,098	19,201	+ 9.9
Pants, slacks & shorts, silk, not knit, total	89.1	54.5	+ 63.5	14,736	8,890	+ 65.8
Hong Kong	80.2	45.3	+ 77.0	12,384	7,045	+ 75.8
Korea	4.3	2.6	+ 65.4	1,050	578	+ 81.7
Mainland China	2.0	0.6	+233.3	227	70	+224.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Shirts, cotton, total	1,166.7	800.6	+ 45.7%	$62,841	$42,022	+ 49.5%
Hong Kong	365.6	273.9	+ 33.5	22,333	14,346	+ 55.7
India	289.5	215.3	+ 34.5	15,974	10,870	+ 47.0
Pakistan	201.2	61.6	+226.6	4,514	1,578	+186.1
Shirts, man-made, not knit, total	314.2	151.8	+107.0	22,088	10,514	+110.1
Taiwan	119.2	60.8	+ 96.1	6,792	3,164	+114.7
Hong Kong	52.7	24.7	+113.4	5,784	2,341	+147.1
Philippines	32.3	15.1	+113.9	1,110	502	+121.1
Shirts, wool, not knit, total	84.0	71.7	+ 17.2	18,788	16,183	+ 16.1
Hong Kong	21.2	9.5	+123.2	4,022	1,706	+135.8
Japan	13.7	21.2	- 35.4	1,516	2,012	- 24.7
United Kingdom	7.6	9.0	- 15.6	2,584	2,915	+ 11.4
Shirts, wool, knit, total	23.2	36.2	- 35.9	3,759	5,872	- 36.0
Hong Kong	16.9	26.2	- 35.5	1,906	2,609	- 26.9
Fr. Germany	1.7	4.1	- 58.5	532	1,317	- 59.6
Italy	1.3	2.2	- 40.9	528	1,055	- 50.0
Shirts, cotton or man-made knit, total	222.6	180.1	+ 23.6	15,247	12,235	+ 24.6
Hong Kong	87.2	74.4	+ 17.2	6,132	5,614	+ 9.2
Taiwan	86.8	52.1	+ 66.6	5,154	2,429	+112.2
Philippines	8.3	4.3	+ 93.0	658	316	+108.2
Playsuits, cotton, not knit, total	1,364.8	897.7	+ 52.0	39,300	25,741	+ 52.7
Mainland China	542.2	224.3	+141.7	13,023	5,002	+160.4
Hong Kong	356.7	382.9	- 6.8	12,087	12,402	- 2.5
Philippines	191.8	108.0	+ 77.6	5,083	2,112	+140.7

* = The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of origin and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135, December 1980, 1981

FOREIGN TRADE

Exports

In 1981, exports of women's and children's sportswear and separates fell nearly 7% in unit terms even though in dollar terms the category increased by 7.3%.

Both the trouser and sweater categories registered a decline in dollars and units in 1981, while skirt exports, as well as blouses and shirts, registered gains in the period. The biggest gainer in 1981 was man-made blouses and shirts which registered a 237.5% gain in dollars and a 264.4% increase in units.

Trousers, slacks and shorts and blouses and shirts combined accounted for over 95% of all women's and children's sportswear exports in 1981, with each category representing well over 47% of the total.

Summary of Exports of Women's & Children's Sportswear, 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Total, all reported categories	3,517.3	3,777.2	- 6.9%	$86,509	$80,653	+ 7.3%
Trousers, slacks & shorts, total	1,668.3	2,196.6	- 24.0	36,928	40,928	- 9.8
Not knit	548.1	460.2	+ 19.1	19,339	16,930	+ 14.2
Cotton	278.1	224.0	+ 24.2	8,852	9,337	- 5.2
Wool	8.5	3.9	+117.9	726	233	+211.6
Man-made	242.4	222.0	+ 9.2	8,926	6,804	+ 31.2
Other	19.1	10.3	+ 85.4	835	556	+ 50.2
Knit	1,120.2	1,736.4	- 35.5	17,589	23,998	- 26.7
Cotton	163.1	139.2	+ 17.2	3,371	3,313	+ 1.8
Wool	586.0	1,334.4	- 56.1	4,310	10,816	- 60.1
Man-made	78.8	110.0	- 28.4	2,383	3,344	- 28.7
Other	292.3	251.8	+ 16.1	7,525	7,155	+ 5.2
Skirts, total	122.4	110.0	+ 11.2	5,589	4,178	+ 33.8
Not knit	65.4	38.5	+ 69.9	3,434	2,069	+ 66.0
Wool	5.5	2.9	+ 89.7	385	132	+191.7
Cotton	29.3	18.5	+ 58.4	1,309	900	+ 45.4
Man-made	28.3	15.8	+ 79.1	1,528	904	+ 69.0
Other	2.3	1.4	+ 64.3	212	133	+ 59.4
Knit	57.0	71.4	- 20.2	2,155	2,109	+ 2.2
Wool	2.1	1.1	+ 90.9	204	91	+124.2
Cotton	17.9	28.5	- 37.2	655	639	+ 2.5
Man-made	31.3	36.1	- 13.3	966	1,014	- 4.7
Other	5.7	5.7	--	330	365	- 9.6

(continued)

FOREIGN TRADE

Exports

Summary of Exports of Women's & Children's Sportswear, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Blouses & shirts, total	1,682.6	1,419.8	+ 18.5%	$41,848	$33,321	+ 25.6%
Knit	615.3	523.1	+ 17.6	17,876	12,913	+ 38.4
Cotton	174.7	202.9	- 13.9	5,030	5,824	- 13.6
Wool	17.7	147.6	- 88.0	759	1,910	- 60.3
Man-made	400.8	110.0	+264.4	11,286	3,344	+237.5
Other	22.1	62.6	- 64.7	801	1,835	- 56.3
Not knit	1,067.3	896.7	+ 19.0	23,972	20,408	+ 17.5
Cotton	161.7	111.9	+ 44.5	4,777	3,823	+ 25.0
Wool	21.5	10.6	+102.8	731	387	+ 88.9
Man-made	387.0	538.6	- 28.1	10,432	11,649	- 10.4
Other	497.1	235.6	+111.0	7,852	4,549	+ 72.6
Sweaters, total	44.0	50.8	- 13.4	2,144	2,226	- 3.7
Knit						
Wool	8.0	6.6	+ 21.2	542	400	+ 35.5
Cotton	13.9	18.7	- 25.7	475	787	- 39.6
Man-made	22.1	25.5	- 13.3	1,127	1,039	+ 8.5

* = The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of exportation, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410, December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The sportswear industry is now benefiting from the "baby boom" years, when U.S. fertility rates were at peak levels in the years 1947 to 1964. There are now close to 74 million aged 18 to 35 years in the population, of which 36.6 million are females. This group represents almost a third of the U.S. population and encompasses an age where interest in sports and active wear, plus ability to spend in this area, is at a peak.

In the years ahead, the baby boomers will account for a rapid growth in the population of those 35 to 54 years of age.

Female Population of the U.S., 1981 & Projections to 2000*
(In Millions)

				Percent of Female Population		
	1981	1990*	2000*	1981	1990*	2000*
Total, all ages	117.9	125.0	133.8	100.0%	100.0%	100.0%
Under 15 years	25.0	26.9	27.8	21.2	21.5	20.8
15 years & older	92.9	98.1	106.0	78.8	78.5	79.2
15-19 years	10.0	8.2	9.7	8.5	6.6	7.2
20-24 years	10.8	8.9	8.3	9.2	7.1	6.3
25-34 years	19.6	20.7	17.3	16.6	16.6	12.9
35-44 years	13.5	18.6	21.1	11.5	14.9	15.8
45-54 years	11.6	13.0	18.4	9.8	10.4	13.8
55-64 years	11.7	10.8	12.1	9.9	8.6	9.0
65 & over	15.7	17.8	19.1	13.3	14.2	14.3
Median age	31.6	32.7	36.8			

* = These are Series II projections, which assume a fertility rate of 2.1 or at the replacement level. These projections, compiled in 1977, are subject to revision based on the results of the 1980 Census of Population.

Source: U.S. Bureau of the Census,
Current Population Reports P-25, Nos. 704, 914.

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 14 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 47 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Estimated Number of Women 18 Years of Age & Over
By Height & Weight, 1982
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	86,063	100.0%	19,537	22.7%	38,251	44.4%	28,251	32.9%
Height:								
5'3" or less	46,991	54.6	14,114	16.4	19,622	22.8	13,254	15.4
5'4" - 5'6"	31,068	36.1	4,992	5.8	14,630	17.0	11,446	13.3
5'7" or more	8,004	9.3	430	0.5	3,959	4.6	3,615	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1982 by age.

RETAIL SALES

Active Sportswear

The National Sporting Goods Association issues an annual report on projected U.S. retail sales of sports apparel and equipment based on purchases made by a panel of 80,000 households nationwide. Projected sales in the table below include active sportswear sales for both women and men, as the NSGA did not separate the data by sex.

For 1981 and 1982, projected sales are for the October through September period.

Estimated Retail Sales of Active Sportswear 1981 & Projected Retail Sales for 1982
(Millions of Dollars)

	Estimated 1981	Projected 1982	Average Price
Athletic socks	$276.6	$281.0	$ 1.74
Bathing suits	860.0	946.0	19.89
Golf clothing	198.0	208.0	na
Down or fiber-filled parkas	351.7	376.0	62.10
Elastic waist shorts	334.0	367.0	7.77
Skiwear	257.7	271.0	na
Sweatshirts	191.5	211.0	10.22
Tennis clothing	150.1	158.0	na
Down or fiber-filled vests	238.0	243.0	32.78
Warm-up suits	352.2	380.0	26.99

Source: National Sporting Goods Association, Sporting Goods Market in 1982.

Jeans

Total jeans sales (both men's and women's) increased by 3% in 1981 to 525 million units according to Jeanswear Communications, a promotional organization for the jeans industry. Sales of women's jeans increased by 16% on a unit basis during 1981 while girls sales were up by 11% in that same year. Jeanswear Communications also reports that denim accounted for 81% of sales while corduroy represented 12% and all other fabrics accounted for the remainder.

Over the last few years it has become apparent that the jeans market is a "mature" one in which many manufacturers are diversifying into other apparel areas, particularly sportswear, in order to maintain their sales and profit levels. This is especially true in the designer segment of the market where 1982 is being characterized by declining dollar volume and deep discounting by retailers in order to maintain their sales base. The main causes cited for the decline in jeans sales are the over saturation of the market, an aging population, consumer resistance to higher price points and a swing to more dramatic fashion pants.

RETAIL SALES

Jeans

Retailers expect that for the remainder of 1982 the basic jeans business will remain highly promotional resulting in increased unit sales but decreased dollar volume. Many industry analysts, however, do see possible promise for a revival of the industry from sales of newer items such as stone washed jeans, black denims and fashion pants.

RETAIL SALES BY STORE TYPE

The only official information on sales of women's sportswear and separates in specified types of retail outlets is reported in the 1977 Census of Retail Trade. Only stores with payrolls are included in merchandise line reports and not all stores are required to break down their sales by merchandise category.

Sportswear, Separates & Coordinates

During 1977, women's ready-to-wear stores took the major share of reported sales of women's sportswear, separates and coordinates, accounting for 44.0% of sales while representing 54.2% of all stores reporting sales in the category. Department stores, while only having 13.0% of the stores reporting sales of women's sportswear, garnered the second largest share of sales with 41.0% of the $10.5 billion market in that year.

Reported Sales of Women's Sportswear Separates & Coordinates by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Sportswear, separates & coordinates	62,875	100.0%	$10,476.6	100.0%
Department stores*	8,177	13.0	4,313.4	41.2
Women's ready-to-wear stores**	34,109	54.2	4,605.4	44.0
Family clothing stores	13,674	21.7	1,102.0	10.5
Men's wear stores	2,619	4.2	119.2	1.1
Shoe stores	353	0.6	10.4	0.1
Children's wear stores	273	0.4	7.4	0.1
Mail order houses	3,670	5.8	318.8	3.0

*Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of specialized women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC77-L.

RETAIL SALES BY STORE TYPE

Women's Active Sportswear

The latest official data on types of women's active sportswear sales comes from the 1977 Census of Retail Trade, among the stores which separately reported on this category, total sales came to about $2.2 billion. Department stores held the lion's share of the reported total, 54%, while accounting for only 18% of the total number of stores reporting sales in the category. Sporting goods stores accounted for only 5.6% of women's active sportswear sales in 1977, but have increased their share in recent years as greater emphasis has been placed on soft goods and fashion activewear in these outlets.

Women's active sportswear accounted for 4.4% of total store sales in women's ready-to-wear stores while it was responsible for 3.6% in family clothing stores and 1.5% in department stores in 1977 according to the U.S. Bureau of the Census.

Reported Sales of Women's Active Sportswear by Store Type, 1977
(Includes only stores with Payrolls)

	Stores Reporting Sales		Sales	
	Number	% of total	Mil. $	% of total
Women's active sportswear*	40,892	100.0%	$2,167.8	100.0%
Department stores**	7,275	17.8	1,178.2	54.4
Women's ready-to-wear stores	17,798	43.5	545.1	25.1
Family clothing stores	8,466	20.7	280.3	12.9
Sporting goods stores, general line***	1,816	4.4	78.2	3.6
Sporting goods stores, specialty line***	1,156	2.8	43.5	2.0
Mail order houses	3,595	8.8	31.7	1.5
Other (men's wear, children's wear stores)	786	2.0	10.8	0.5

*Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major category types of outlets handling each category.

**See footnote below.

***Reported as sales of women's and girls' clothing, except footwear.

RETAIL SALES BY STORE TYPE

Women's Active Sportswear

Percent of Total Sales Accounted for by Women's Active Sportswear Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Accounted for by Women's Active Sportswear
Department stores**	$ 76,909.4	1.5%
Women's ready-to-wear stores	12,250.3	4.4
Family clothing stores	7,883.6	3.6

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations which are included in mail order house data.

Source for the preceding two tables:
U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Department Stores

The number of firms operating department stores declined to 600 in 1977 according to the Census of Retail Trade, published by the U.S. Bureau of the Census, from a total of 866 counted in the 1972 census. This decline represented a drop of 30.7% for the period. The number of stores operated by these firms increased 13.7% from 7,742 department stores counted in 1972 to 8,807 in 1977. By 1979, the census bureau estimated that there were 9,013 department stores in business with sales of $90 billion. In 1981, department store sales surpassed the $100 billion mark attaining a peak of $103.6 billion in that year. Preliminary data from the Census Bureau indicates that over the first six months of 1982, department store sales had risen 10.4% over sales for the same period in 1981.

The department business has become more concentrated among large firms. In 1977, the 50 largest department store operators controlled 86.5% of all department store sales as compared to 82.1% in 1972 according to the U.S. Bureau of the Census.

Department Stores: Number of Stores & Total Sales 1978-1981

	1981	1980	1979	1978	% Change 1981/1980	% Change 1980/1979
Number of Stores	na	na	9,013	8,546	na	na
Total Sales (Mil. $)	$103,609	$94,705	$90,006	$84,496	+ 9.4%	+ 5.2%

na = not available

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales & Inventories,
County Business Patterns, 1978, 1979.

RETAIL SALES BY STORE TYPE

Department Stores

Department Stores by Employee Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores, total	9,013	100.0%	1,[illegible]8,156	100.0%	$11,531.6	100.0%
By establishment size:						
Under 50 employees	1,266	14.0	48,857	3.0	325.7	2.8
50-99 employees	2,276	25.3	164,020	10.2	1,071.1	9.3
100-249 employees	3,706	41.1	581,698	36.2	3,796.8	32.9
250-999 employees	1,694	18.8	684,354	42.6	5,049.8	43.8
1,000 or more employees	71	0.8	129,227	8.0	1,288.2	11.2

Source: U.S. Bureau of the Census,
County Business Patterns, 1979

Women's sportswear and separate departmental operating results are compiled annually by the National Retail Merchants Association. Findings for 1980 are summarized on the next page.

Selected Typical (Median) 1981 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store	All Adult Female Apparel	All Adult Female Sportswear	Junior Spectator Sportswear	Junior Active Sportswear	Women's & Misses' Spectator Sportswear	Women's & Misses' Active Sportswear	All Adult Female Jackets & All-Weather Coats
Net sales, % change from last year	+ 6.7%	+ 8.8%	+ 13.1%	+ 3.2%	+ 34.9%	+ 13.5%	+ 25.6%	+ 3.7%
Sales, % of merchandise division	--	100.0	32.4	14.3	1.2	44.2	4.0	1.4
Sales, % to total store sales	90.1	24.5	13.1	3.0	0.3	9.3	0.9	0.6
$ sales per sq. ft. of selling space	$111.8	$129.2	$142.4	$173.7	--	$139.9	$179.4	$163.0
Cumulative mark-on, %	48.2%	50.8%	51.1%	51.8%	51.8%	51.4%	50.8%	50.0%
Gross margin, % of sales incl. cash discounts	42.0	43.0	44.4	46.0	49.4	44.6	48.4	43.3
Markdowns, retail, % of sales	13.0	20.9	19.1	19.2	13.3	20.4	12.1	18.4
Returns, % of sales	8.3	11.2	10.7	11.6	6.7	13.2	8.9	11.4
Sales promotions, % of sales	3.2	2.9	2.7	3.7	3.3	3.0	2.6	4.0
Salespeople's salaries, % of sales	7.5	6.8	6.6	4.8	--	6.2	6.6	6.5
Number of stock turns	2.7	3.8	4.0	4.6	4.6	3.9	4.0	3.6

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1982 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Large firms, with annual sales of $1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of $8.0 billion or 64.6% of total sales of this store type ($12.4 billion). By 1981, sales of women's ready-to-wear stores had risen to $16.5 billion an increase of nearly one-third from their 1977 level. County Business Patterns reports that in 1979 there were 36,606 women's ready-to-wear stores in operation, down 7.9% from 1978's total of 39,765.

Women's Ready-To-Wear Stores: Number of Stores & Total Sales 1978-1981

	1981	1980	1979	1978	% Change 1981/1980	% Change 1980/1979
Number of Stores	na	na	36,606	39,765	na	na
Total Sales (Mil. $)	$16,532	$15,074	$14,969	$14,297	+ 9.7%	+ 0.7%

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales & Inventories, County Business Patterns, 1978, 1979.

Women's Ready-To-Wear Stores by Employee Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Women's ready-to-wear stores, total	39,606	100.0%	357,341	100.0%	$2,705.0	100.0%
By establishment size:						
Under 10 employees	28,704	72.5	122,438	34.3	706.1	34.0
10-19 employees	7,763	19.6	105,658	29.6	571.0	27.5
20-49 employees	2,573	6.5	74,567	20.8	410.2	19.8
50-99 employees	436	1.1	29,765	8.3	186.0	9.0
100 or more employees	130	0.3	24,913	7.0	201.7	9.7

Source: U.S. Bureau of the Census, Country Business Patterns, 1979

Sales of Women's Ready-To-Wear Stores by Month, 1980, 1981

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1981	100.0%	6.7	6.1	7.4	8.4	8.0	7.6	7.8	8.6	8.5	8.9	8.8	13.2
1980	100.0%	6.7	6.2	7.6	7.9	8.0	7.2	7.5	8.6	8.3	9.1	9.3	13.6

Source: U.S. Bureau of the Census, Revised Monthly Sales & Inventories.

In 1980, sales of adult female sportswear in women's specialty stores increased 9.1% according to the National Retail Merchants Association.

RETAIL SALES BY STORE TYPE

Specialty Stores

Selected Typical (Median) 1981 Merchandising & Operating Results In Specialty Stores with Total Annual Sales over $1 Million

	Women's & Misses' Sportswear	Women's & Misses' Spectator Sportswear	Women's & Misses' Active Sportswear	Juniors' Sportswear	Juniors' Spectator Sportswear	Juniors' Active Sportswear
Net sales, % change from last year	+ 8.9%	+ 15.0%	+ 12.8%	+ 17.1%	+ 17.2%	--
Sales, % of merchandise division	44.4	36.2	3.0	22.9	15.4	4.3%
Sales, % to total store sales	21.4	15.6	1.2	12.2	7.6	2.2
$ sales per sq. ft. of selling space	$175.5	$261.0	$196.4	$151.9	--	--
Cumulative mark-on, %	51.7%	51.2%	51.2%	51.3%	51.3%	50.3%
Gross margin, % of sales incl. cash discounts	43.8	42.6	47.0	43.2	42.4	43.4
Markdowns, retail, % of sales	20.6	18.9	13.5	17.9	21.7	20.3
Returns, % of sales	11.7	--	--	7.8	--	--
Sales promotions, % of sales	2.3	--	--	2.2	--	--
Salespeople's salaries, % of sales	7.6	--	--	7.6	--	--
Number of stock turns	3.8	3.7	4.1	4.4	5.1	3.9

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1982 Edition.

Seasonal Pattern

A five-year average (1961-1965) in department store sportswear department sales shows the following monthly pattern:

Percent of Years' Total Sales by Month In Blouse, Skirt & Sportswear Departments

Month	Percent	Month	Percent
January	5.1%	July	7.7%
February	5.0	August	8.0
March	6.6	September	8.6
April	7.6	October	8.8
May	8.8	November	9.2
June	8.7	December	15.9

Source: Newspaper Advertising Bureau, Sales Planning Guide.

RETAIL ADVERTISING BY MONTH

Percent of Year's Total Newspaper Linage by Retailers Used Each Month, 1981

	Coats & Jackets	Pants & Shorts	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts
January	7.2%	5.5%	4.7%	4.8%	4.6%
February	7.0	8.2	5.4	4.5	8.0
March	7.2	10.6	5.4	15.4	10.2
April	5.9	9.8	6.5	7.1	10.9
May	2.9	9.9	7.7	20.4	9.6
June	2.6	7.4	6.9	22.5	5.2
July	3.8	6.7	4.8	13.4	5.8
August	9.1	9.4	9.6	4.8	8.5
September	12.8	8.3	9.5	0.4	8.9
October	15.4	7.8	11.0	0.0	8.4
November	14.9	9.0	13.8	4.3	9.9
December	11.2	7.4	14.7	2.4	10.0

Source: The Advertising Checking Bureau, Inc., Neustadt Reports Division, covering all retail newspaper advertising linage in all newspapers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles and Washington. (1983 Newspaper Planbook).

CONSUMER PRICES

There has been a slight downward trend in retail prices covering separates and sportswear in recent months, while overall consumer price levels in women's apparel showed a gain.

Consumer Price Index
(1977=100)

	April 1982	April 1981	% Change 1982/1981	Annual Average 1981	1980	% Change 1981/1980
Apparel commodities less footwear*	177.4	174.0	+ 2.0%	174.0	167.8	+ 3.7%
Women's apparel	107.1	105.0	+ 2.0	104.3	103.1	+ 1.2
Coats & jackets *	163.4	157.6	+ 3.7	159.1	164.2	- 3.1
Separates & sportswear	100.1	100.2	- 0.1	99.0	99.8	- 0.8

* Base: 1967 = 100

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Data on the purchases of specific types of women's sportswear, as shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research Inc., Floral Park, New York. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for women includes family members 17 years old and older.)

Place of Purchase

In each of the women's sportswear and separates categories covered, with the exception of jackets, specialty stores accounted for the largest share of reported dollar volume of purchases in 1981, with department stores ranking second. For jackets the order is reversed with department stores holding the number one spot and specialty stores second.

Percent of Women's Sportswear Purchases by Type of Outlet, 1981
(Based on Dollar Volume)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts	Jackets
Specialty stores	30.8%	28.7%	33.1%	32.9%	28.9%	31.0%
Department stores	29.8	23.7	29.4	30.3	25.3	36.9
Major chains*	14.4	14.3	14.5	15.2	16.6	12.0
Discount stores	17.0	19.3	14.4	14.2	19.7	11.9
Variety stores	1.8	2.7	0.9	1.2	2.0	0.9
Mail order	1.5	1.6	1.7	1.8	1.4	1.3
All others	4.7	9.7	6.0	4.4	6.1	6.0

* = Includes Sears, Penney, Ward, etc.

Source: NPD Research, Inc.

Seasonality

The majority of shorts and tops are purchased during the spring and summer seasons, according to NPD data. Sweaters, blazers and jackets are bought prior to the onset of winter, primarily during October, November and December.

Percent of Women's Sportswear Purchases by Month, 1981
(Based on Dollar Volume)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts/ Tennis Dresses	Jackets
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	6.7	3.0	9.8	7.7	1.6	9.6
February	5.2	4.0	6.0	5.5	2.2	5.2
March	7.2	8.4	3.7	7.5	4.2	7.0
April	9.3	11.5	2.7	9.6	13.2	7.8

(continued)

Seasonality

Percent of Women's Sportswear Purchases by Month, 1981
(Based on Dollar Volume)
(continued)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts/ Tennis Dresses	Jackets
May	8.6%	16.4%	2.2%	7.7%	19.6%	5.5%
June	8.0	19.9	1.3	7.1	29.3	2.5
July	8.9	14.8	3.0	7.9	18.2	5.8
August	8.0	8.5	6.8	9.3	5.0	7.1
September	8.1	4.2	9.5	9.2	3.4	11.0
October	9.8	2.4	12.5	10.0	1.6	12.9
November	9.0	3.2	16.4	7.8	.4	11.5
December	11.2	3.7	26.1	10.7	1.3	14.1

By Price Line

Percent of Women's Sportswear Purchases by Price Point, 1981

	Shorts/Tennis Dresses		
	Units	Dollars	Average Price
Under $3.00	23.3%	8.4%	$ 2.25
$3.00 - $6.99	45.7	34.9	4.77
$7.00 & over	31.0	56.7	11.44

	Shirts & Blouses		
	Units	Dollars	Average Price
Under $4.00	10.3%	2.4%	$ 2.62
$4.00 - $7.99	29.0	15.9	6.17
$8.00 - $11.99	26.5	23.3	9.90
$12.00 & over	34.2	58.4	19.23

	Sweaters			Slacks & Pants	
	Units	Dollars	Average Price	Units	Dollars
Under $10.00	40.0%	19.8%	$ 6.71	43.2%	21.3%
$10.00 - $19.99	45.2	47.4	14.22	42.4	46.5
$20.00 & over	14.8	32.8	30.04	14.4	32.2

(continued)

By Price Line

Percent of Women's Sportswear Purchases by Price Point, 1981
(continued)

	Jackets		
	Units	Dollars	Average Price
Under $20.00	34.3%	14.4%	$ 13.64
$20.00 - $49.99	50.5	49.6	31.92
$50.00 & over	15.2	36.0	76.70

	Other Tops		
	Units	Dollars	Average Price
Under $3.00	22.5%	7.2%	$ 2.01
$3.00 - $4.99	26.3	16.8	4.01
$5.00 - $7.99	26.9	27.4	6.39
$8.00 & over	24.3	48.6	12.55

Source: NPD Research Inc.

Jeans

A profile of women's jeans purchases in 1981 indicated that department stores ranked first in sales with specialty stores a close second.

Percent of Women's Denim Jeans Purchases by Type of Outlet, 1981

	Units	Dollars
Department stores	38.4%	35.8%
Specialty stores	29.4	33.9
Discount stores	25.7	21.1
Variety stores	3.4	2.8
Mail order	1.1	1.1
Other	5.6	5.3

Percent of Total Jeans Purchases by Month, 1981

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	7.0	6.3	8.1	8.8	8.5	6.8	8.1	14.6	7.9	7.4	7.4	9.1
Dollars	100.0%	6.2	6.3	7.7	8.2	8.6	7.1	7.4	13.7	8.3	8.4	7.6	10.5

(continued)

Jeans

Percent of Jeans Purchases by Price Point, 1981

	Units	Dollars	Average Price
Less than $8.00	13.3%	4.7%	$ 5.70
$8.00 - $11.99	20.4	12.9	10.19
$12.00 - $15.99	22.9	19.9	14.00
$16.00 - $19.99	19.2	21.7	18.21
$20.00 - $29.99	18.8	28.7	24.60
$30.00 & over	5.4	12.1	36.11

Source: NPD Research Inc.

The Teenage Market

The SEVENTEEN Magazine 1981 Spring Apparel Buying Study was conducted in order to acquire information on the purchasing power and fashion preferences of teenage girls. Areas of specific interest included total expenditures for a wide variety of items, as well as the number of girls purchasing and the number of items purchased.

Questionnaires were mailed in May 1981 to 2,000 members of SEVENTEEN's Consumer Panel, a representative cross section of the teenage market. The first 1,060 returns were processed and form the basis of the study. Survey results have been projected to the total teenage market by SEVENTEEN, as noted below.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Jackets			
Ski jackets	2,714	2,877	$ 139,937
Blazers	2,648	3,787	163,636
Parkas	758	826	36,154
Jackets - blouson	559	609	20,822
- bomber	146	149	4,342
Leather/suede jackets	625	638	45,458
Fur coats (real)	253	255	32,732
Pea coats	182	183	9,492
Fur jackets (fake)	67	68	3,072
Total buying jackets	6,001	9,392	455,645
Skirts			
Knee-length	5,801	12,530	315,380
Below knee-length	5,628	10,299	255,209
Total buying skirts	9,341	22,829	570,589

(continued)

Teenage Buying Trends for Sportswear & Separates (continued)

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Pants			
Shorts	9,221	50,623	$ 554,322
Long, straight leg	6,467	12,093	242,827
Jeans	5,216	22,794	573,041
Narrow-leg	3,020	5,194	174,051
Ski	559	688	30,699
Cuffed pants	439	654	11,792
Wide leg	439	505	14,802
Total buying pants	12,827	92,551	1,601,534
Total buying shirts/blouses	10,698	40,545	678,723
Sweaters			
Pullovers	3,695	8,564	226,175
Turtlenecks	2,355	5,157	121,447
Cardigans (cardigan vest)	1,889	3,684	107,536
Coat sweaters	1,224	1,481	42,105
Sweater jackets	652	756	19,134
Pullover vests	612	1,077	32,493
Total buying sweaters	5,814	20,719	548,890
Tops			
T-shirts	12,281	53,300	575,107
Sweatshirts	3,353	13,345	113,032
Tanks	3,167	7,949	38,473
Halters	2,701	5,105	37,522
Camisoles	2,275	4,573	57,986
Total buying tops	12,667	84,272	822,120

Teen Girls Favorite Skirt Length Trends, 1978-1981

	1981	1980	1979	1978
Total responses	100.0%	100.0%	100.0%	100.0%
Just below the knee	80.8	80.2	70.9	67.5
At the knee	10.9	7.4	6.1	12.3
Midi	5.1	9.2	19.8	14.1
Any and all lengths	1.4	1.5	1.6	1.7
Just above the knee	1.3	1.3	0.4	2.6
Ankle length	0.5	0.4	1.2	1.6
Mini	--	--	--	0.2

Source: SEVENTEEN Magazine,
Spring Apparel Buying Study, 1981

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in November 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES (November): Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

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MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

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